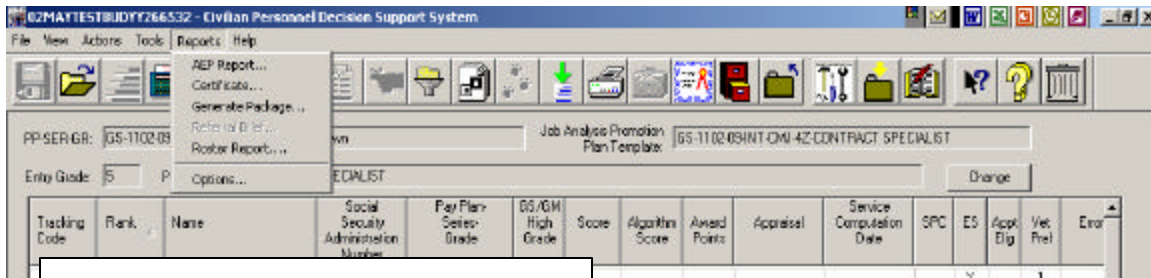
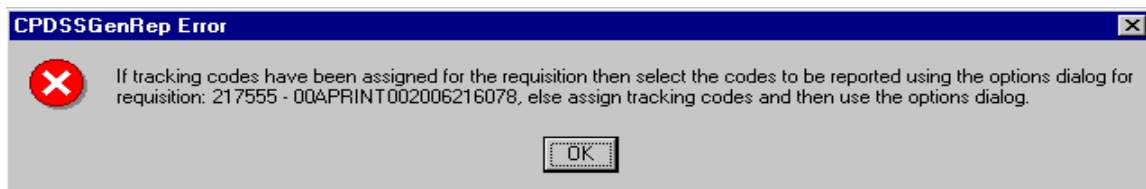


Chapter 7 - Generating the Referral Certificate and Referral Certificate Package

The Air Force Candidate Referral Certificates are organized by Tracking Codes. Select which group of candidates will appear on a certificate by choosing **Reports > Options** from the main menu.



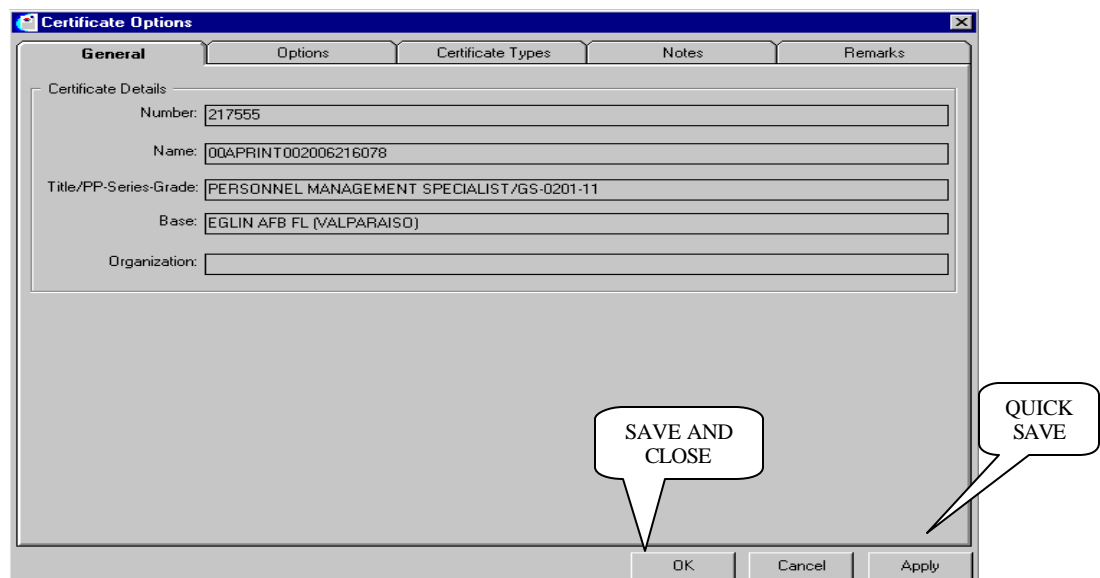
Note: When using the **Reports** menu, an attempt to generate the Certificate or Package without completing the following options will cause this dialog box to appear.



Once **Options** has been selected, the **Certificate Options** Window will appear. The five tabs appearing on the screen are discussed below.

General

This tab is 'read only' and shows information imported from the requisition.



Options

This tab allows you to add or override areas of the certificate.

Make sure you change the Expiration Date

A calendar can be accessed using the drop-down menu.

Certificate Options

General **Options** Certificate Types Notes Remarks

Certificate

Issue Date: 19-Jun-2002 Expiration Date: 19-Jun-2002

Bargaining Unit: AF2350 PATCOB:

Position Type: 1 - Competitive Service No. of Vacancies:

Additional Info.:

Certifying Official

Name: Title:

Selecting Official

Name: Phone:

Office Symbol: E-Mail Address:

Default...

OK Cancel Apply

June 2002

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today: 6/19/2002

Certificate Types

This tab uses Tracking Codes to identify which candidates appear on the certificate and the sort order of these candidates. Only candidates with the Tracking Codes selected will appear on the Certificate. **Note:** Each Tracking Code selected will generate a separate referral certificate. The only exception to this is the "Certificate of Eligibles" used for DEU referrals.

Candidates will be sorted by name.

Candidates will be sorted by rank.

Civilian Referral Briefs can only be selected when Certificate Type is Internal

A list of all the Tracking Codes used on the Candidate Referral Roster (CRR) will appear here. You must select the code(s) you wish to use to generate a Referral Certificate. In the example above, a certificate will be generated only on those individuals with Tracking Codes of "RFC".

Certificate Type is determined by the option you select under 'Select Certificate Type'. Data contained within the parentheses will be displayed on your certificate. Example: (Tracking Code) means the Type of Certificate will be based on Tracking Code selected.

Track Code	Description
<input checked="" type="checkbox"/> RFC	Voluntary Change to Lower Grade Consideration

NOTES:

- **Civilian Referral Briefs:** Only available for internal candidates. This feature will not be used when an External certificate is selected.
- **Resume Text:** (All external candidates).
- **CONUS AEP:** (Use for positions filled within the Continental United States).
- **Hawaii AEP:** (Use for positions located in Hawaii).

The **Notes and Remarks** tabs are used to add additional information concerning the position or candidates on the referral certificate. **NOTE:** Information typed in either of these areas will be displayed in either the Notes or Remarks area of the certificate. Maximum number of characters for each field is 500 and maximum number of lines is 5.

The image shows a screenshot of a software window titled "Certificate Options". The window has a tabbed interface with five tabs: "General", "Options", "Certificate Types", "Notes", and "Remarks". The "Notes" tab is currently selected and active. The main area of the window is a large, empty text box for entering notes. At the bottom of the window, there are three buttons: "OK", "Cancel", and "Apply".

Producing the Referral Certificate/Package

After the certificate options have been identified, you are ready to generate the Referral Certificate or Certificate Package. To produce only the certificate, select **Reports > Certificate**. To produce the entire package (Certificate(s), AEP Reports, Resume Text or Career Briefs) elect **Reports > Generate Package** from the main menu or use the **Generate Package** button.



Sample Referral Certificate Packages:

Certificate Options

General Options **Certificate Types** Notes Remarks

Select Sort Order

- ☒ Candidate Last Name

Internal Package With (Tracking Code)

☐ Civilian Referral Briefs

☐ Resume Text

☒ CONUS AEP

☐ Hawaii AEP

Select Certificate Type

- ☒ Internal (Tracking Code)
- External
 - ☐ Non-Competitive External (Tracking Code)
 - ☐ Certificate of Eligibles (DEU, Score, Veterans Preference)
 - ☐ Excepted Service Ranked List (Score, Veterans Preference)
 - ☐ Excepted Service Unranked List (Veterans Preference)

Track Code Description

Sample Certificate

Air Force Candidate Referral Certificate		Type of Certificate: Voluntary Change to Lower Grade Consideration	
Requisition ID: 02M AR INT 112447000109	Date Issued: 5/23/2002 12:00:00AM	Expiration Date: 6/24/2002 12:00:00AM	BU: AF1765
Pay Plan - Series - Grade / Position Title: GS-0525-07 / ACCOUNTING TECHNICIAN		Base: WRIGHT-PATTERSON AFB / GREENE	# of vacancies: 1
Entry Gr Lvl: 7			
Remarks:			
For Additional Information Call: Liana Blalock DSN 665-40744 Ext 4784		PATCOB: CLERICAL	Type of Position: Competitive
Name & Title of Certifying Official: Liana Blalock,		Signature of Certifying Official:	
Name	PayPlan - Grade	Org/Office Symbol	Phone
SJ	GS - 09	DPMSC 7	655-1111 WORK

Notice the Column Headings- **NOTE:** these will change depending on the Certificate Type.

Civilian Career Brief

CIVILIAN REFERRAL BRIEF				Current as of: 20-Jun-2002	
FOR OFFICIAL USE ONLY, CONTAINS INFORMATION SUBJECT TO PRIVACY ACT OF 1974 AS AMENDED. PROTECT ACCORDINGLY.					
Name: SA [REDACTED]			SSN: 2 [REDACTED]		
DUTY PHONE: 65 [REDACTED]		DUTY LOCATION: Wright-Patterson Afb, Greene, OH			
PP-SERIES - GRADE: GS - 0318 - 06		TITLE: SECRETARY (OFFICE AUTOMATION)			
OFF. SYMBOL: ENM		CPCN: 9G056.SECRETARY (OFFICE AUTOMATION).23497.AF1M.APPR			
DT. START POSN: 25-APR-1999		SCD: 18-JAN-1977		DT. LAST PROMO: 24-APR-1988	
EXPTYPE: Federal Civil Service		SUPV LEVEL: 8		ACQ CATEGORY: ** <No Data> **	
ASSGN EFFECTIVE DT: 25-APR-1999		ASSGN STATUS: Active Assignment		De mo BB: De mo PP:	
SKILL1: ANT Secretary		PERCENTAGE: 75.00		MONTHS: 28.00	
SKILL2: OAS Office Automation Clk/Ast		PERCENTAGE: 25.00		MONTHS: 9.00	
EXPERIENCE HISTORY:					
Start Dt.	End Dt.	PP-SERS-GR	Title	ACQ Category	ACQ Level
	Type		Supv Lvl		
	Category				De mo BB De mo PP
14-MAR-1999	24-APR-1999	GS - 0318 - 06	Secretary		Total Months Experience: 1.35
	Federal Civil Service		Non-Supervisory	** <No Data> **	** <No Data> **
	MTC - Air Force Materiel Command			** <No Data> **	** <No Data> **
	Skill1: ANT		Secretary		Percentage: 75 Months: 1.01
	Skill2: OAS		Office Automation Clk/Ast		Percentage: 25 Months: 0.34
11-OCT-1998	13-MAR-1999	GS - 0318 - 06	Secretary		Total Months Experience: 5.10
	Federal Civil Service		Non-Supervisory	** <No Data> **	** <No Data> **
	MTC - Air Force Materiel Command			** <No Data> **	** <No Data> **
	Skill1: ANT		Secretary		Percentage: 75 Months: 3.83
	Skill2: OAS		Office Automation Clk/Ast		Percentage: 25 Months: 1.28
30-AUG-1998	10-OCT-1998	GS - 0318 - 07	Secretary		Total Months Experience: 1.39
	Federal Civil Service		Non-Supervisory	** <No Data> **	** <No Data> **
	MTC - Air Force Materiel Command			** <No Data> **	** <No Data> **
	Skill1: ANT		Secretary		Percentage: 75 Months: 1.04
	Skill2: ANA		Clerk Stenographer		Percentage: 15 Months: 0.21
	Skill3: OAS		Office Automation Clk/Ast		
10-NOV-1996	29-AUG-1998	GS - 0318 - 06	Secretary		Total Months Experience: 21.65
	Federal Civil Service		Non-Supervisory	** <No Data> **	** <No Data> **
	MTC - Air Force Materiel Command			** <No Data> **	** <No Data> **

AEP Report – Lists all minority groups, to include those that are not under-represented.

AFFIRMATIVE EMPLOYMENT INFORMATION

CERTIFICATE NUMBER: 02MARINT112447000109

TYPE OF CERTIFICATE: Voluntary Change to Lower Grade Consideration

TITLE: ACCOUNTING TECHNICIAN

PAY PLAN - SERIES - GRADE: GS-0525-07

The enclosed referral certificate (s) has the following representation

1 BLACK, NOT OF HISPANIC ORIGIN MALES

You may have local goals for the categories below

DEFINITIONS:

DISABLED (NON-TARGET): Persons with medical disability codes greater than 05 as depicted in SF 256 with exception of target codes listed below

DISABLED (TARGET GROUP): persons with medical disability codes 16, 17 (DEAF); 23, 25 (BLIND); 28 and 32-38 (MISSING EXTREMITIES); 64-68 (PARTIAL PARALYSIS); 71-78 (COMPLETE PARALYSIS); 82 (CONVULSIVE DISORDERS); 90 (MENTAL RETARDATION); 91 (MENTAL ILLNESS); 92 (DISTORTION OF SPINE/LIMBS) as depicted on SF 256

This data may not be available for certificates with non - Air Force Candidates

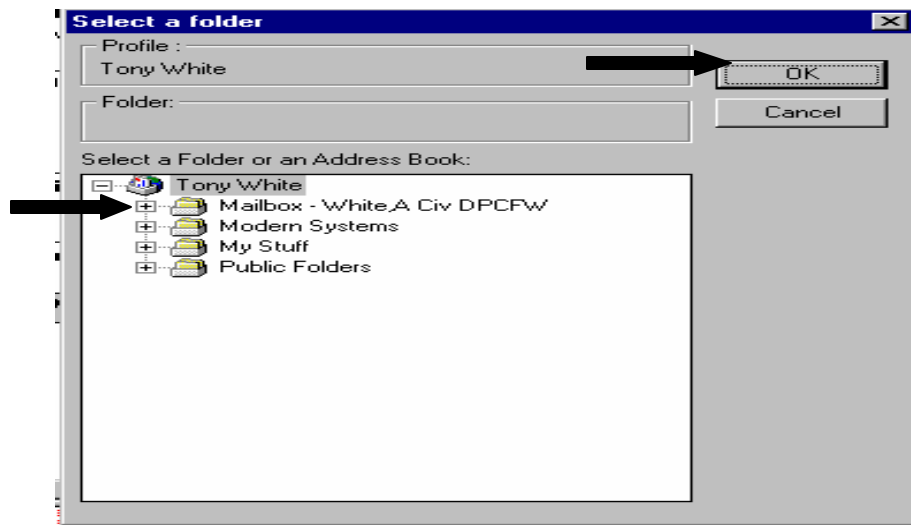
FOR OFFICIAL USE ONLY

Sending the Package Electronically

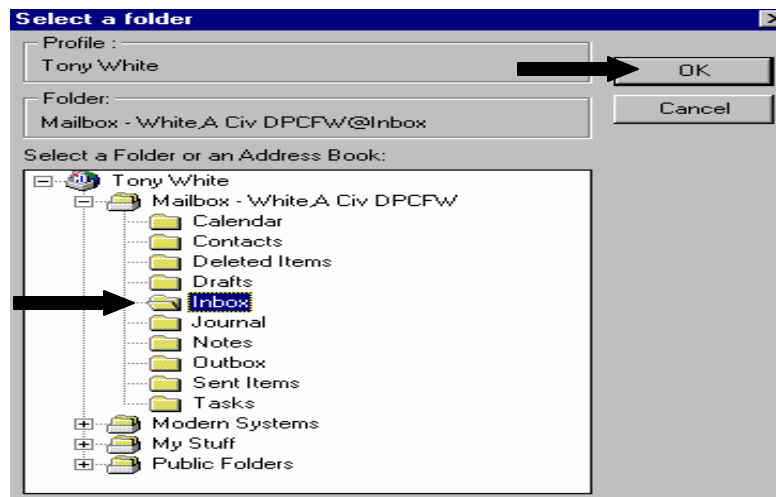
- Select the Open Envelope, the following screen will appear.
- Select **Acrobat Format (PDF)** as the Format.
- Select **Exchange Folder** as the Destination. Click **<OK>**.



- The **Select a Folder** Window will display indicating your exchange profile name. Select your mailbox folder and click **<OK>**.



The certificate and all of the identified attachments will flow to your exchange inbox. Select **Inbox** and click **<OK>**.



At this point you may open the document for final review, add other required certificate referral documents/instructions, and forward to the CPF and/or selecting official based on internal procedures for that CPF.

NOTE: The certificate or certificate package generated will be “Read Only.” If changes are required to your certificate, they will have to be made to the candidate referral roster and a new certificate package will need to be generated.

Return of the Referral Certificate

Once the manager has made his or her selection(s), the certificate must be returned by Fax. Once you receive the annotated certificate you must go back to CPDSS and fill in the tracking codes the manager has assigned on the certificate: Selected, Declined, Not Selected, etc. and save.

02MARINT112447000109 - Civilian Personnel Decision Support System

File View Actions Tools Reports Help

Set Tracking Codes for BO

PP-SER-GR: GS-0525-07

Entry Grade: 7 Position:

Tracking Code	Rank	Name
RFP	1	DAL
RFP	2	CXE
RFP	3	BEC
RFP	4	BOE
RFP	5	SAL
RFC	6	SAL

- Agency Objections (DR)
- Consideration Declined (CD)
- DEU Declinations (DD)
- DEU Non-Referral - Notice of Rating (DEU - NR)
- DEU Referral
- Developmental Referral
- Ineligibility (I)
- Legacy (Do Not Use)
- Non-Referral (NR)
- Non-Selection
- Not Qualified (NQ)
- Offer Declined (OD)
- Other (DEU)
- Referral External (RE)
- Referral Internal (RI)
- Referral Special Placement (RSP)
- Selection (SE) (DSA)
 - ☐ DSA -- Selected (For each selection provide the expected date of appointment)
 - ☒ SEL -- Selection
 - ☐ SEP -- Selection and PCS Restriction

OK Cancel

You also need to send the Tracking Codes manually back to Resumix through CPDSS.

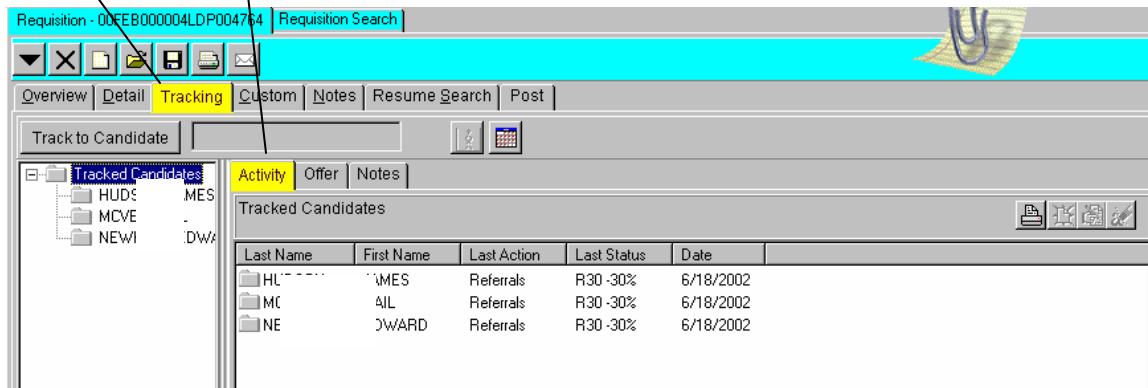
Hiring the Applicant – Updating Resumix

Once the effective date has been established, the staffing specialist will be required to update Resumix with the following information:

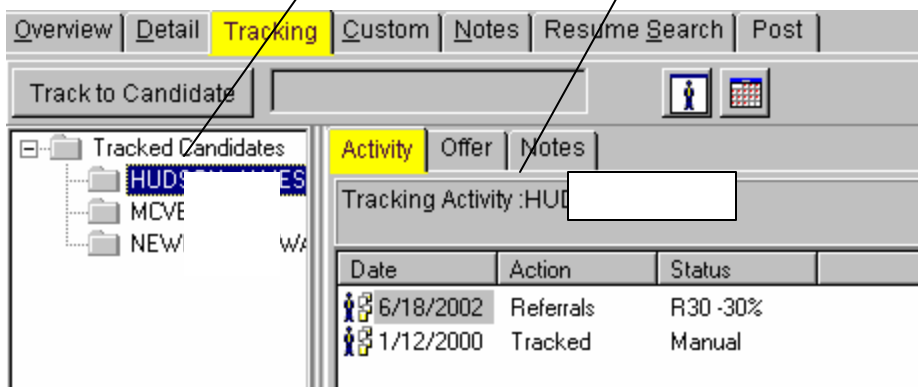
Step 1: Open the Resumix requisition being filled. (Follow the guidance in Chapter 3, Selecting an Existing Requisition.)

Step 2: Click the **Tracking** tab.

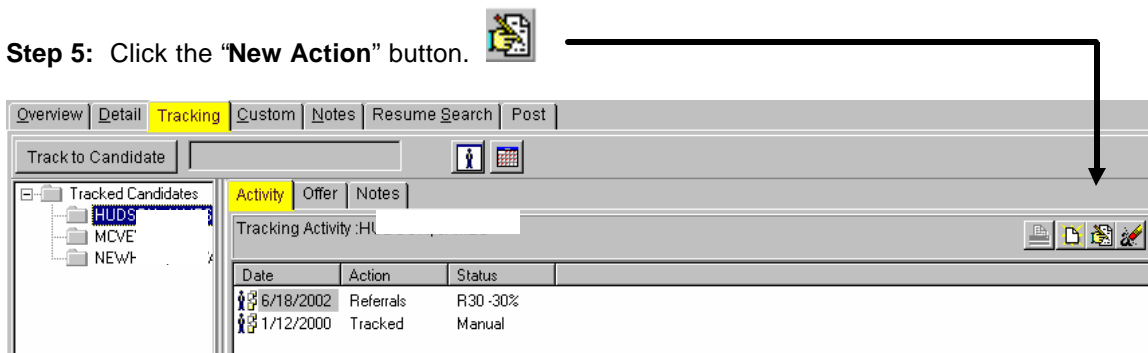
Step 3: Select the **Activity** tab.



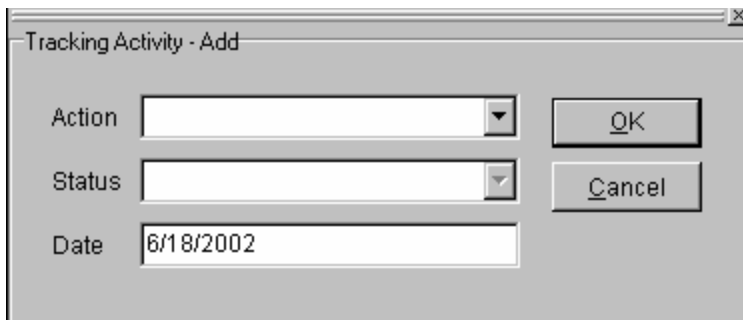
Step 4: Click on the selected applicant. The **Tracking Activity** for that applicant is now viewable.



Step 5: Click the “New Action” button.



Step 6: The **Tracking Activity – Add** box appears.



Tracking Activity - Add

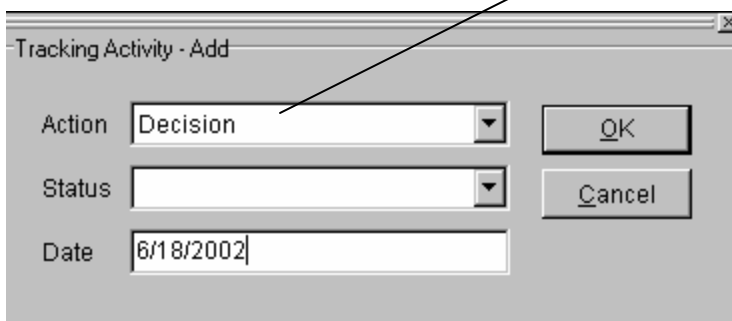
Action

Status

Date 6/18/2002

OK Cancel

Step 7: Using the drop down menu select **“Decision”** as the Action.



Tracking Activity - Add

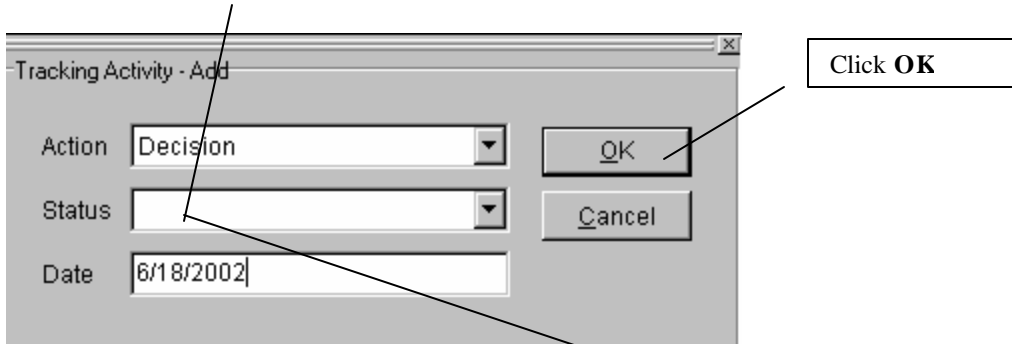
Action Decision

Status

Date 6/18/2002

OK Cancel

Step 8: The **“Status”** field must be completed; however, it is dependent on several different factors.



Tracking Activity - Add

Action Decision

Status Internal Accept

Date 6/18/2002

OK Cancel

Click OK

Review the chart below for the appropriate **Status** code.

Candidate	Currently in Modern DCPDS	Status =
Currently a Permanent Employee (Tenure = 1, 2)	Yes	Internal Accept
Currently a Temporary Employee (Tenure = 0)	Yes	External Accept
Currently serving on an Overseas Limited Appt or Term Appt (Tenure = 3)	Yes	Internal Accept
Not Currently an Employee	No	Accept
Currently an Employee	No	Accept

Decision/Accept



IMPORTANT!!! The staffing specialist will use the **Decision/Accept** Tracking Code only when hiring a candidate that is **not** currently in the Modern DCPDS database. If filling a vacancy with an employee currently in the Modern DCPDS **Decision/Internal Accept** or **Decision/External Accept** will be used.

Whenever the **Decision/Accept** Tracking Code is selected in Resumix, a **new Applicant record is created in the Modern DCPDS to be used in the appointment process.** For this reason, the Tracking Code combination (**Decision/Accept**) is only to be used if the selected candidate **is not** currently an Air Force employee (currently in the Modern DCPDS database).

When the **Decision/Accept** Tracking Code is used, the system automatically

- Changes the applicant's status to **Hired**,
- Changes the position status to **Filled**, if only one (1) vacancy exist, and
- Decreases the Number of Openings by one.

Note: These automatic actions do not occur when you use the Internal Accept or the External Accept Tracking Code. You must change these fields manually.

Step 9: Notice the new entry on the **Tracking Activity** screen for the candidate selected. A similar entry is added when you use Internal Accept or External Accept.

Date	Action	Status
6/18/2002	Decision	Accept
6/18/2002	Referrals	R30 -30%
1/12/2000	Tracked	Manual

Step 10: Update the Resume Summary for the selected candidate. Select the **Resume**

Summary button.

Date	Action	Status
6/18/2002	Decision	Accept
6/18/2002	Referrals	R30 -30%
1/12/2000	Tracked	Manual

Step 11: The **Resume Summary** window will appear. Select the **Custom** tab.

The screenshot shows the 'Resume Summary' window for Requisition - 00FEB000004LDP004764. The 'Custom' tab is selected. The 'Group' is set to 'GENERAL'. The 'Resume Expiration' field is circled in red. The 'Resume Expiration' field is a date field with a value of 4/1/1998. Other fields include Birth Date (5/23/1950), Citizenship (1), Education Level (17), Lowest Pay Acceptable (21269), Social Security Number (2), Temporary Employment (Y), Typing Speed (15), and Veteran Preference (2).

Step 12: The **Resume Summary** for that candidate will be viewable.

- Under the **General** group, locate **Resume Expiration** custom field. Change the **Resume Expiration** custom field to:

Position Candidate Selected For...	Action to be Taken
Temporary Position (Tenure = 0)	Change the date to current date.
Permanent/Term/Overseas Limited Position (Tenure = 1, 2, or 3)	Delete the resume expiration date.

NOTE: Only external applicants will have resume expiration dates.

Step 13: THIS STEP IS ONLY TO BE USED IF AN EXTERNAL CANDIDATE IS SELECTED FOR A PERMANENT/TERM/OVERSEAS LIMITED APPOINTMENT (TENURE = 1, 2, or 3). Prior to completing this step, you must make sure the Modern DCPDS applicant record has flowed into Modern DCPDS.

- 1) Under **Resume Summary** tab, select **History** tab.
- 2) Place a check ☒ in the **Available** block.
- 3) Change the source code to **INTERNAL**.

Requisition - 00FEB000004LDP004764 Resume Summary - JAMES HUDSON

Overview | Detail | **History** | Tracking | Custom | Notes | EEO

Status

Current Received ☒ Available

Date Description

3/27/1997	Received
6/18/2002	Hired
6/18/2002	Hired
6/18/2002	Hired

Source

Current INTERNAL **Change To** INTERNAL

Date Code Description

6/19/2002	INTERNAL	Internal Employee Resumes
5/22/1996	EXTERNAL	External Resumes

To change:
 1 - Click on the folder.
 2 - Select **Internal** from the list.
 3 - Click **Select** button.
 4 - Click the **Change To** button. Current source should read **Internal**.

4) Under **Resume Summary** tab, select the **Notes** tab.

Add the following note: Source code changed to internal - placement into a (Tenure 1, 2, or 3 (select correct tenure)) position on (enter date).

Requisition - 00FEB000004LDP004764 Requisition Search Resume Summary - [] IN

Overview Detail History Tracking Custom **Notes** EEO


dkeating 05/23/96 verified
resumix 05/23/96 Printed response mailing label
dschultz 07/15/96 Printed letter label
dschultz 08/19/96 edited
dschultz 08/19/96 Printed letter label
dschultz 08/21/96 Printed letter label
dschultz 08/21/96 Printed letter label
lkeir 11/13/96 req#2961645, wg-6912-07, nq
lkeir 11/13/96 edited
dsnowden 02/12/97 AFNC 5 PT VET REQ NR 2961798 A/O 02/12
kgrego 10/02/97 edited 180 ext
maxfiell 10/30/97 #2963482 NQ Lacks MS in SW & Exp

Source code changed to Internal - placement into a Tenure 1 position on 06/18/2002.
kevans: 6/18/2002 5:52:51 PM

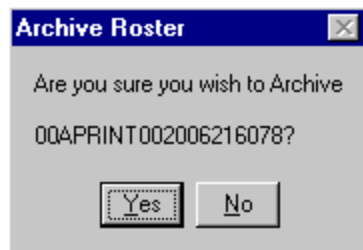
Example

Click the **Save**  button.

Archiving the CRR

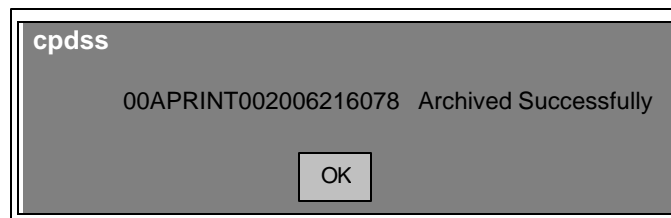
Click the Archive CRR button  or select **Actions > Archive** from the main menu to archive a CRR. You will be prompted to verify this action.

Click **<Yes>**
to continue.



If the archive is successful, you will be presented with a dialog box similar to the following.

Click **<OK>**.



The File is Now Archived!!!!!!

- **Note:** Once a Case file is archived, the file cannot be manipulated in any way. You can only add notes.
- **Note:** Specialists should archive case files as soon as possible after EOD but within 90 days. Most of the case file documentation will be in CPDSS but any extraneous items should be in a case file (such as the requisition and vacancy announcement—those are Resumix items, not CPDSS generated).

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